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# Netherlands

# Retail Food Sector

# Benelux

# 2007

**Approved by:**
Steve Huete
U.S. Embassy, The Hague

**Prepared by:**
Marcel Pinckaers

**Report Highlights:**
This report in combination with the Benelux Exporter and FAIRS Report provides an important road map for U.S. exporters who wish to enter the Benelux retail market.

Includes PSD Changes: No
Includes Trade Matrix: No
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## Section I. Market Summary

### Benelux Food Retail Market

Approximately 80 percent of the Dutch food retail outlets are full service supermarkets, operating on floor space between 500 and 1,500 square meters located downtown and in residential areas. The remaining 20 percent includes superstores located in industrial parks, convenience stores near human traffic and department stores. In Belgium, full service supermarkets, like GB, Colruyt and AD Delhaize, account for an estimated 75 percent of the market. The share of superstores and convenience stores in Belgium is higher than in the Netherlands, an estimated 25%. In Luxembourg, full service supermarkets like Cactus, Alvo and Match dominate the market as well. In all three markets, independent food retail stores are increasingly leaving the scene. On-going consolidation in the retail market, changing consumer demands and shrinking margins seem to drive this trend.

The top 3 biggest retailers in the Netherlands, Albert Heijn, C1000, and Aldi, have a market share of 51 percent. The growing market share of discounters like Koop Consult, Aldi and Lidl has stopped. Both Aldi and Lidl saw their market share shrinking, Bas van der Heijden and Digros were able to maintain their share of the market. In Belgium, the leading 3 retailers have 70 percent of the market. Recent consolidation and market share figures for Luxembourg were not available when writing the report. For more information about recent market shares, see table 1.

Table 1: Market Shares of Leading Food Retailers in 2006/2007

| Netherlands | | Belgium | | Luxembourg | |
|---|---|---|---|---|---|
| Company Name | Market Share | Company Name | Market share | Company Name | No. of Stores |
| Albert Heijn | 27.5% | Carrefour | 29.0% | Delhaize | 30 |
| C1000 | 14.5% | Delhaize | 25.5% | Cactus | 18 |
| Aldi | 9.0% | Colruyt | 16.0% | Match | 14 |
| Plus + Spar | 7.8% | Aldi | 12.0% | Alvo | 11 |
| Super de Boer | 7.5% | Lidl | 3.5% | Smatch | 8 |
| Jumbo | 4.4% | Louis Delhaize | 3.0% | Cora | 2 |
| Lidl | 3.8% | Other | 24.1% | Auchan | 1 |
| Other | 25.5% | Total | 100.0% | | |
| Total | 100.0% | | | | |

Source: AC Nielsen/USDA

### Higher Prices For Food Products

The turnover of the Benelux food retail industry in 2006 was an estimated €46.1 billion (€27,4 billion in the Netherlands, €18.3 billion in Belgium and €0.4 billion in Luxembourg).
The price war among Dutch supermarkets, which continued on until 2005, lowered consumer prices for food products. However, more recently average food prices have gone up considerably. According to the Central Bureau of Statistics (CBS), Dutch food prices rose by almost 10% between July 2006 and July 2007. Dairy products increased by almost 25% while meat and seafood products became cheaper within the same timeframe. The European Commission (EC) expects consumer prices for meat products to go up as well in the coming year. Feed prices, an important driver behind meat prices, have gone up considerably because of higher prices for raw materials.

### Changing Consumer Needs

In addition to the fact that Benelux consumers are shedding retailer-loyalty, they shop at different times and locations. During lunch breaks, people buy their lunch and the food products they need for preparing the evening meal. Small convenience stores, like “AH To Go”, “GB Express” and “Delhaize shop ‘n go” are opened at locations near heavy traffic like train stations, schools, and shopping malls to satisfy these consumers’ needs.

The traditional neighborhood grocery stores are either going out of business, are taken over or are changing their product portfolio. They are expanding the grocery line of fresh and convenient prepared-foods with tailor made sandwiches, filled tortillas and drinks to satisfy the consumers’ need for “food for now” attitude. The ready-to-cook segment is also expanding.

### Advantages and Challenges of the Benelux Food Retail Market

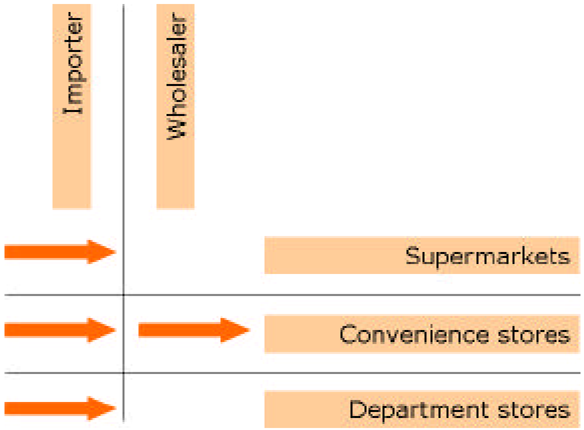
| Advantages | Challenges |
| --- | --- |
| Sector Strengths & Market Opportunities: | Sector Weaknesses and Competitive Threats: |
| Expected economic growth is a promising prospect for the retail industry | Competition from foodservice is growing since the size of households is getting smaller, time has become scarce and the younger generation lack cooking skills |
| Affluent, open minded and curious consumers create opportunities for new products | Discounters are the fastest growing segment in the Benelux retail market; margins continue to be under pressure |
| The region has an excellent infrastructure which offers great opportunities | Competition is growing from non-food retail players like IKEA, HEMA, V&D and Bijenkorf as they enter the food market |
| The industry is highly consolidated and therefore has a strong negotiating position and good contacts | EU import regulation and tariffs. EU enlargement has given and will give preferential access to products from new member countries |

## Section II. Road Map For Market Entry

### Entry Strategy

Success in introducing your product in the Benelux market depends mainly on knowledge of the market and building personal contact with knowledgeable and established importers. Prior to any export, invest in research that analyzes the Benelux food culture (concepts, flavor, price, requirements). Once the product has been chosen, be aware of fierce competition. There are several tariff and non-tariff trade barriers that complicate exporting to the Benelux. An importer knows the market, the trade barriers and the required documentation. In addition, the Office of Agricultural Affairs (OAA) offers guidelines on business practices and import regulations (www.fas.usda.gov Exporter Guide and FAIRS Report). Dutch importers often serve as distributors as well. The OAA and FAS/Washington maintain listings of importers.

**Market Structure**




**Supermarkets and Superstores**

The vast majority of supermarkets and superstores buy foreign (specialty) products via specialized importers. This is especially the case for retail ready consumer oriented products like sauces, beverages and snack products. Convenience stores operate, in general, on a much smaller scale and therefore buy smaller quantities through wholesalers. Department stores work either through importers or buy directly from third countries' exporters. Many imported intermediate and some consumer oriented products are often processed before sold to the consumer. Products like nuts, produce, in some cases fish and wine would fall in this category.

Retailers increasingly have their stores divided in different categories. For each category they will have 2 or 3 preferred suppliers who are responsible for supplying the full range of products within the category. This way, the retailer negotiates with just a handful of suppliers for supplying fruits & vegetables, meat products, seafood products, drinks, bakery products, etc. For the international specialty products area within supermarkets, retailers usually work with a few specialized importers who are responsible for composing and filling those shelves.

As described in Section I, the retail industry in the Benelux is rather consolidated, however on the purchase side the industry is even more consolidated since several smaller retailers have joined forces. As a result, they have been able to increase their bargaining power. The following figures will give you an overview of the different buying combinations in the Netherlands and Belgium.

Table 2: Leading Buying Groups in The Netherlands

| Purchase Group | Market Share | Store name |
|---|---|---|
| **Albert Heijn**<br>Provincialeweg 11<br>1506 MA Zaandam<br>www.ah.nl | **27.5%** | Albert Heijn |
| **Superunie**<br>Industrieweg 22B<br>4153 BW Beesd<br>www.superunie.nl | **26.7%** | Jumbo, PLUS, Jan Linders, Vomar, Spar, DeKamarkt, Coop, Hoogvliet, Golff, etc. |
| **Laurus**<br>Parrallelweg 64<br>5223 AL Den Bosch<br>www.laurus.nl | **11.9**% | Super de Boer |
| **Trade Service Netherlands**<br>(Schuitema)<br>Databankweg 26<br>3821 AL Amersfoort<br>www.schuitema.nl | **14.6%** | C1000 |
| **Aldi**<br>Erasmusweg 3<br>AK Culemborg<br>www.aldi.nl | **7.5%** | Aldi |
| **Koop Consult**<br>Edisonstraat 11<br>2171TV Sassenheim<br>www.superjob.nl | **4.4%** | Dirk van de Broek, Bas van der Heijden, Digros, Jan Bruijns, Drogisterij & Dirx, Slijterijen DrikIII, etc. |
| **Lidl**<br>P.O. Box 198<br>1270 AD Huizen<br>www.lidl.nl | **3.9%** | Lidl |

Source: AC Nielsen/USDA estimates

Table 3: Leading Buying Groups in Belgium

| Purchase Group | Market Share | Store name |
|---|---|---|
| **Carrefour**<br>Olympiadenlaan 20<br>B-1140 Brussels<br>www.carrefourbelgium.be | **26.9%** | Mestdagh/Champion and GB Supermarkets, |
| **Delhaize Group**<br>Osseghemstraat 53<br>B-1080 Brussels<br>www.delhaizegroep.com | **20.8%** | AD Delhaize, Delhaize City, Proxy Delhaize, Delhaize Supermarket and Shop 'n Go, |
| **Colruyt**<br>Steenweg op Edingen 196<br>B-1500 Halle<br>www.colruyt.be | **16.9%** | Colryt, Bio Planet, Spar, Alvo and Okay-winkels |
| **Aldi**<br>Keerstraat 4<br>B-9420 Erpe-Mere<br>www.aldi.be | **11.2%** | Aldi |
| **Louis Delhaize**<br>Group Purchaser;<br>Provera Belux<br>Av. J. Mermoz 22<br>B-6041 Gosselies<br>www.supermarche-match-supermarkt.be | **9.9%** | Louis Delhaize, Cora Belux, Louis Delhaize De Kruidernier (grocer), Delitraiteur and Match, |
| **Lidl**<br>Guldensporenpark 90 blok J<br>B-9820 Merelbeke<br>www.lidl.be | **3.9%** | Lidl |

Source: AC Nielsen/USDA estimates

Table 4: Supermarkets and Super Stores

| Name | Format | Ownership | Locations |
| --- | --- | --- | --- |
| **Netherlands** | | | |
| Albert Heijn | Supermarket | Royal Ahold | Nation wide |
| Jan Linders | Supermarket | Jan Linders | Regional |
| C1000 | Supermarket | Schuitema | Nation wide |
| Super de Boer | Supermarket | Laurus | Nation wide |
| Coop | Supermarket | CoopCodis | Nation wide |
| Jumbo | Super Stores | Jumbo | Regional |
| C1000 | Super Stores | Schuitema | Nation wide |
| AH XL | Super Stores | Royal Ahold | Regional |
| **Belgium** | | | |
| AD Delhaize | Supermarket | Delhaize Group | Nation wide |
| Alvo Supermarkt | Supermarket | Colruyt | Nation wide |
| Bio Planet (Organic) | Supermarket | Colruyt | Nation wide |
| Colruyt | Supermarket | Colruyt | Nation wide |
| Delhaize City | Supermarket | Delhaize Group | Nation wide |
| Delhaize Proxy | Supermarket | Delhaize Group | Nation wide |
| Eurospar | Supermarket | Colruyt | Nation wide |
| GB Contact | Supermarket | Carrefour | Nation wide |
| Match | Supermarket | Louis Delhaize Group | Nation wide |
| O'Cool | Supermarket | Frost Invest | Nation wide |
| Okay | Supermarket | Colruyt | Nation wide |
| Profi | Supermarket | Louis Delhaize Group | Nation wide |
| Smatch | Supermarket | Louis Delhaize Group | Nation wide |
| Spar Supermarkt | Supermarket | Colruyt | Nation wide |
| Carrefour | Super Stores | Carrefour | Nation wide |
| Cora Belux | Super Stores | Louis Delhaize Group | Nation wide |
| Delhaize Supermarkt | Super Stores | Delhaize Group | Nation wide |
| GB Super | Super Stores | Carrefour | Nation wide |
| GB Super Partner | Super Stores | Carrefour | Nation wide |

Supermarket - retail surface = 1,500 m2
Super Stores – retail surface > 1,500 m2

**Discounters**

Table 5: Discounters

| Name | Ownership | Locations |
|---|---|---|
| **Netherlands** | | |
| Aldi | Aldi-Gruppe | Nation wide |
| Lidl | Lidl & Schwarz | Nation wide |
| Dirk van de Broek | Dirk van de Broek | Regional |
| Bas van der Heijden | Bas van der Heijden | Regional |
| Digros | Digros | Regional |
| Jan Bruijns | Jan Bruijns | Regional |
| **Belgium** | | |
| Colruyt | Colruyt | Nation Wide |
| Aldi | Aldi Inkoop | Nation Wide |
| Lidl | Lidl Belgium GmbH & Co KG | Nation Wide |
| Tecno | Tecno N.V. | Regional |

**Department Stores**

Table 6: Department Stores

| Name | Ownership | Locations |
|---|---|---|
| **Netherlands** | | |
| Bijenkorf | Lion Capital LLP (UK) | Nation wide |
| HEMA | Maxeda (NL) | Nation wide |
| V & D | Maxeda (NL) | Nation wide |
| **Belgium** | | |
| Inno | GALERIA INNO/ Kaufhof A.G. | Nation wide |

**Convenience Stores, Gas Marts and Kiosks**

Table 7: Convenience Stores

| Name | Ownership | Locations |
|---|---|---|
| **Netherlands** | | |
| AH To Go | Royal Ahold | Regional |
| **Belgium** | | |
| Delitraiteur | Louis Delhaize Group | Nation wide |
| Louis Delhaize | Louis Delhaize Group | Nation wide |
| Louis Delhaize Kruidenier | Louis Delhaize Group | Regional |
| GB Express | Carrefour | Nation wide |
| Night & Day | Night & Day Presse | Regional |
| White Night | Louis Delhaize Group | Regional |

"AH to go" are situated at train stations, busy shopping streets and business districts, products sold are ready to eat meals, and other meal components or snacks.
Source: AC Nielson

Table 8: Gas Marts

| Name | Ownership | Gas Company | Locations |
|---|---|---|---|
| **Netherlands** | | | |
| AH To Go | Royal Ahold | Shell | Regional |
| **Belgium** | | | |
| Delhaize Shop 'n go | Delhaize Group | Q8 | Nation wide |

Source: AC Nielson

Kiosks
Independent small shops dominate food outlets at train stations.

**Traditional Outlets**

Grocery stores, butcher stores, bakeshops etc. are still popular in the Netherlands although increasingly they face competition from food retailers. Through extra service, sales of high-quality added value products and the serving of niche markets, they try to survive.

## Section III. Competition

Knowledgeable and experienced traders, excellent logistics, highly sophisticated processing industry, professional distribution channel and affluent consumers make the Benelux an attractive export market.

The Benelux is in general not the most competitive producer of bulk products, due to the high prices for agricultural land and labor, lack of scale, animal welfare and multiple rules and regulations. In addition, the Benelux has a highly sophisticated processing industry. As a result, the Benelux increasingly is dependent on stable supplies of bulk and intermediate products (like seafood, grains, soya, fruit juices, cranberries, nuts, meat, etc.) from other EU member states and third countries. In addition to sufficiency, the Benelux is also depending on other countries, especially Southern Hemisphere countries, for the year-round availability of e.g. fresh fruit and certain vegetables. Another reason why importers and food distributors turn to foreign markets is to look for unique products. This can be both new products and well-known products that are different one way or another. U.S. cranberries, grapefruits, pistachios, sweet potatoes, and a full range of specialty food products have gained popularity over the years.

Table 9: U.S. Market Share Versus Main Suppliers' Market Share in Consumer Oriented and Fish & Seafood Products, Netherlands (value in million US $), 2006

| **Product Category** | **Main Supplies Including %** | **Strengths of Key Countries** | **Advantages and Disadvantages of Local Suppliers** |
|---|---|---|---|
| HS 02: Meat and Edible Meat Offal | | | |
| Value US$ 2,993 | 1. Germany 27.1<br>2. Belgium 17.6<br>3. Brazil 16.7<br>20. U.S. 0.2 | 1,2: distance and availability<br>3: price/quality ratio | Focus on dairy production instead of beef production |
| HS 03: Fish And Crustaceans, Molluscs And Other Aquatic Invertebrates | | | |
| Value US$ 2,209 | 1. Iceland 17.3<br>2. Germany 11.4<br>3. Denmark 8.4<br>10. U.S. 3.2 | 1,3: great variety due to geographical location<br>2: big processing industry | tradition in seafood trading;<br>Good geographical location |
| HS 04: Dairy Produce; Birds' Eggs; Natural Honey | | | |
| Value US$ 3,057 | 1. Germany 43.1<br>2. Belgium 17.3<br>3. France 8.6<br>14. U.S. 0.5 | 1,2,3: Proximity | Great tradition of producing milk and milk based processed products |
| HS 07: Edible Vegetables And Certain Roots And Tubers | | | |
| Value US$1,830 | 1. Spain 31.8<br>2. Belgium 15.1<br>3. France 14.7<br>16. U.S. 0.9 | 1: different climate/supply season<br>2,3: proximity | Great innovative industry producing horticultural products |
| HS 08: Edible Fruit And Nuts; Peel Of Citrus Fruit Or Melons | | | |
| Value US$ 4,058 | 1. S. Africa 11.3<br>2. Chile 9.4<br>3. Spain 9.1<br>6. U.S. 5.2 | 1,3: different climate/supply season/taste/varieties | A mature industry (especially apples and pears) |
| HS 09: Coffee, Tea, Mate And Spices | | | |
| Value US$ 705 | 1. Germany 18.5<br>2. Brazil 12.3<br>3. Belgium 8.9<br>35. U.S. 0.3 | 2: availability | No domestic availability |
| HS 16: Edible Preparations of Meat, Fish, Crustaceans, Molluscs or other Aquatic Invertebrates | | | |
| Value US$ 993 | 1. Belgium 26.1<br>2. Brazil 19.2<br>3. Germany 18.1<br>15. U.S. 0.9 | 3: price / quality ratio | No domestic availability |
| HS 19: Preparations Of Cereals, Flour, Starch Or Milk; Bakers' Wares | | | |

| | | | |
|---|---|---|---|
| Value $1,174 | 1. Belgium 31.8<br>2. Germany 30.8<br>3. France 8.2<br>14. U.S. 0.6 | Proximity and re-export | No domestic availability |
| HS 20: Preparations Of Vegetables, Fruit, Nuts, Or Other Parts Of Plants | | | |
| Value US$ 2,231 | 1. Germany 19.5<br>2. Brazil 14.2<br>3. Belgium 10.4<br>8. U.S. 4.0 | 2. price / quality ratio | No domestic availability |
| HS 21: Miscellaneous Edible Preparations | | | |
| Value US$ 1,178 | 1. Germany 27.5<br>2. Belgium 14.7<br>3. U.K. 8.6<br>4. U.S. 8.4 | Proximity and re-export | No domestic availability |
| HS 22: Beverages, Spirits and Vinegar | | | |
| Value US$ 2,748 | 1. France 25.2<br>2. Germany 22.7<br>3. Belgium 17.0<br>8. U.S. 2.5 | Excellent regional products | No domestic availability |

Source: www.gtis.com

Table 10: U.S. Market Share Versus Main Suppliers' Market Share in Consumer Oriented and Fish & Seafood Products, Belgium (value in million US), 2006

| **Product Category** | **Main Supplies** | Strengths of Key Countries | **Advantages and Disadvantages of Local Suppliers** |
|---|---|---|---|
| HS 02: Meat and Edible Meat Offal | | | |
| Value US$ 1,357 | 1. France 23.2<br>2. Netherlands 20.0<br>3. N. Zealand 17.4<br>14. U.S. 0.7 | 1,2: distance and availability<br>3: excellent price/quality ratio | Good domestic availability of beef |
| HS 03: Fish And Crustaceans, Molluscs And Other Aquatic Invertebrates | | | |
| Value US$ 1,510 | 1. Netherlands 21.6<br>2. France 8.9<br>3. Denmark 6.4<br>14. U.S. 2.4 | 3: great variety due to geographical location<br>1,2: big traders within the industry | tradition in seafood trading; good geographical location |
| HS 04: Dairy Produce; Birds' Eggs; Natural Honey; | | | |
| Value US$ 2,705 | 1. France 29.3<br>2. Netherlands 28.6<br>3. Germany 21.0<br>23. U.S. 0.0 | 1,2,3: Proximity | Great tradition of producing milk and milk based processed products |
| HS 07: Edible Vegetables And Certain Roots And Tubers | | | |
| Value US$ 1,348 | 1. Netherlands 33.0<br>2. France 26.8<br>3. Spain 12.3<br>21. U.S. 0.4 | 3: different climate/supply season<br>1,2: proximity | Great innovative industry producing horticultural products |
| HS 08: Edible Fruit And Nuts; Peel Of Citrus Fruit Or Melons | | | |
| Value US$ 3,231 | 1. Colombia 13.9<br>2. Costa Rica 10.3<br>3. Spain 8.2<br>12. U.S. 3.1 | 1,2,3: different climate/supply season/tastes/varieties | A mature industry (especially apples and pears) |
| HS 09: Coffee, Tea, Mate And Spices | | | |

| | | | |
|---|---|---|---|
| Value US$ 687 | 1. Brazil 13.8<br>2. Germany 12.9<br>3. France 11.3<br>39. U.S. 0.1 | 3: availability | No domestic availability |
| HS 16: Edible Preparations of Meat, Fish, Crustaceans, Molluscs or other Aquatic Invertebrates | | | |
| Value US$ 864 | 1. Netherlands 27.8<br>2. France 22.1<br>3. Germany 20.0<br>23. U.S. 0.4 | Proximity and re-export | No domestic availability |
| HS 19: Preparations Of Cereals, Flour, Starch Or Milk; Bakers' Wares | | | |
| Value US$ 1,219 | 1. France 35.2<br>2. Germany 22.7<br>3. Netherlands 20.7<br>16. U.S. 0.3 | Proximity and re-export | No domestic availability |
| HS 20: Preparations Of Vegetables, Fruit, Nuts, Or Other Parts Of Plants | | | |
| Value US$ 1,412 | 1. Brazil 28.9<br>2. France 18.5<br>3. Netherlands 13.4<br>12. U.S. 1.1 | 1: price / quality ratio | No domestic availability |
| HS 21: Miscellaneous Edible Preparations | | | |
| Value US$ 870 | 1. Netherlands 30.4<br>2. France 21.7<br>3. Germany 20.3<br>6. U.S. 2.2 | Proximity and re-export | No domestic availability |
| HS 22: Beverages, Spirits and Vinegar | | | |
| Value US$ 2,330 | 1. France 53.3<br>2. Netherlands 10.5<br>3. Germany 10.4<br>17. U.S. 0.5 | 1,3: Excellent regional products | No domestic availability |

Source: www.gtis.com

## Section IV. Best Products Prospects

A. Products Present In The Market That Have Good Sales Potential
Wines
Ground and tree nuts
Fruit juices
Processed fruit and vegetables
Beverages
Cranberries

B. Products Not Present In Significant Quantities But Which Have Good Sales Potential
Dried fruits
Functional/health foods
NHTC beef
Innovative sauces, beverages and condiments

C. Products Not Present Because They Face Significant Barriers
Red meat and meat preparations (hormone ban)
Poultry (sanitary procedures)
Processed food (with GMO ingredients, bleached flour etc.,)

## Section V. Post Contact and Further Information

United States Department of Agriculture's Foreign Agricultural Service
U.S. Embassy
Lange Voorhout 102, 2514 EJ The Hague, The Netherlands
Phone: +31 (0)70 3102.299
Fax: +31 (0)70 365.7681
E-mail: agthehague@fas.usda.gov

For more information on exporting U.S. Products to the Benelux, please visit the FAS website at www.fas.usda.gov and www.usembassy.nl/fas.html or contact Marcel Pinckaers at marcel.pinckaers@fas.usda.gov or +31 (0)70 3102.305.

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| Country | Title | Date | Report Number |
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| Netherlands | FAIRS Report | 9-24-2007 | NL7017 |
| Netherlands | Specialty Foods Report | 9-13-2007 | NL7021 |
| Netherlands | Consolidation of the Dutch Food Retail Sector | 6-1-2006 | NL6017 |
| Belgium | FAIRS Report | 9-24-2007 | BE7003 |
| Benelux | Tree Nuts Report | 2-2-2007 | NL7002 |
| Benelux | Beef Report | 4-23-2007 | NL7008 |
| Benelux | Exporter Guide | 10-17-2007 | NL7025 |
| Germany | Retail Report | 9-17-2007 | GM7043 |
| France | Retail Report | 2-2-2006 | FR6064 |
| Spain | Retail Report | 1-15-2007 | SP6039 |
| Norway | Retail Report | 12-12-2006 | NO6008 |
| Finland | Consolidation and Restructuring of the Nordic Retail Food Sector | 11-27-2006 | FI6006 |

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